Friendraising=Fundraising

Nurturing Stakeholder Relationships to Meet Fundraising Goals

2006 Community Involvement Conference
June 28, 2006

Tim Jones, EPA
Gayle Marriner-Smith, Peconic Estuary Program
Kathy Klein, Partnership for the Delaware Estuary
Karen Fligger, ORISE















Buzzards Bay Project



















Tim Jones EPA, Office of Wetlands, Oceans, & Watersheds



Francisco Estuary Project









Main Messages

- EPA's return on investment is high!
 - Over the past three years (2003-2005) the NEPs have leveraged approximately \$50 million in base funding to generate nearly \$515 million (10:1)
- These funds help protect and restore hundreds of thousands of acres of habitat and reduce point and nonpoint sources of pollution.
- The NEPs obtained these funds by building relationships with a diversity of private, local, State, and Federal partners.

Outline of Presentation

- Background
- What is "Leveraging?"
- 2005 results
- Sources of NEP Leveraging
- Uses of NEP Leveraging
- Discussion

What is "Leveraging?"

- Resources obtained by the NEPs above and beyond their base funding provided by EPA.
- Sources include public and private funds and in-kind contributions.

How do the NEPs leverage?

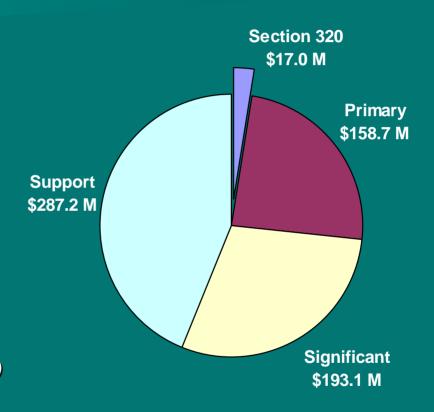
- Develop finance plans
- Form strategic alliances
- Demonstrate results
- Provide resources to initiate and develop new funding sources

How is Leveraging Measured?

- Categorized by role NEP played
 - "Primary role" (28 reported)
 - "Significant role" (24 reported)
 - "Support role" (16 reported)
- Program Activity Measure: "Overall combined ratio of leveraged resources (cash or in-kind services) to Section 320 funds for all NEPs"

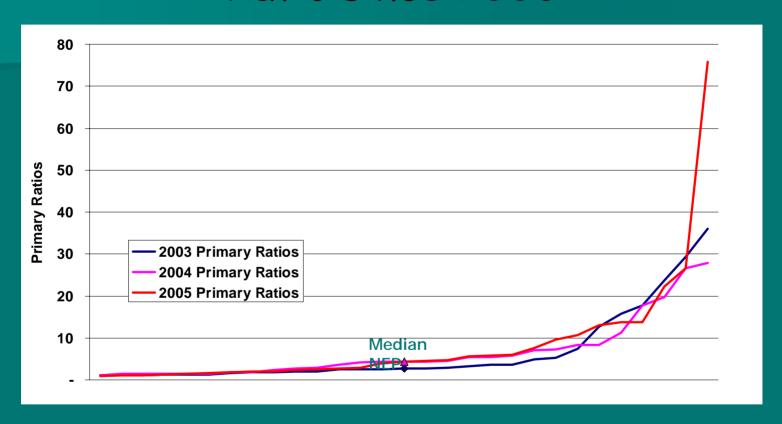
2005 Results

- Using about \$17 million in base funding, the 28 NEPs:
 - Played a primary role in generating nearly \$158 million (a 9.3:1 leveraging ratio)
 - Played some role in generating about \$639 million (a 37:1 leveraging ratio)



Total Leveraging: \$639 million

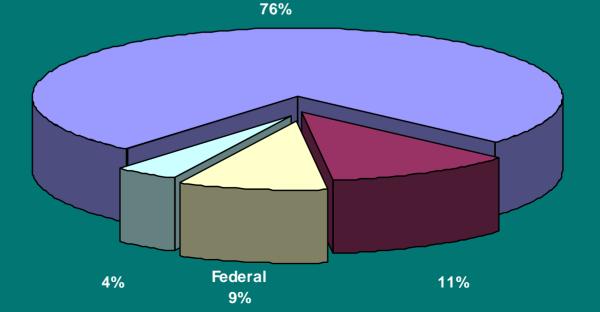
NEPs Increased Their Primary Leveraging Ratio since 2003



- The median increased 1.6 from 2003 to 2004, but remained constant from 2004 to 2005.
- NEPs in the middle part of the range moved to a higher primary ration after 2003.

Source of Funds - Overall

- States provided about 75% of the primary leveraged dollars
- Local government was the next largest source at about 10% state

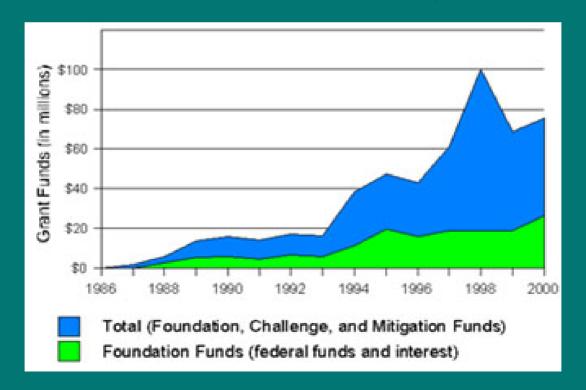


2005 Primary Leveraging Uses Total \$159 million

- Land acquisition= 24%
- Restoration activities= 18%
- Research and monitoring=12%
- \$87 million was directed to these 3 program areas.

Leveraging in Other Programs

- National Fish & Wildlife Foundation
 - Average >2:1 leveraging ratio
 - \$226 million in federal funds leveraged >\$470 million



Leveraging in Other Programs

- Five Star Restoration Program
 - Average 5:1 leveraging ratio from project partners

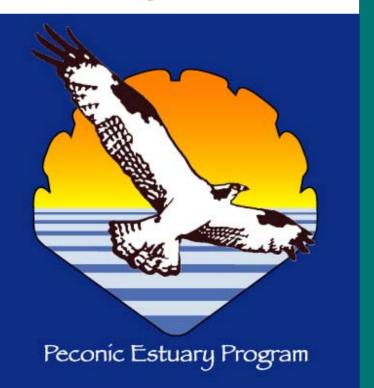
- EPA State Revolving Fund programs' return on federal investment
 - Clean Water: 1.90:1.00 since program inception
 - Drinking Water: 1.65:1.00 since program inception

Discussion

- Steps to Improve Leveraging
 - On-site Financial Planning Assistance
 - On-line tools and databases (e.g., Plan2Fund)
 - Work with funders



"Promoting All That's Good In The World" Multimedia Marketing • Public Relations • Events



Friendraising = The Recruitment of Financial Contributors

Gayle Marriner-Smith
Peconic Estuary Program
Ecovision, Inc.

Friendraising

The most effective way to build long-term financial security for your organization or cause.

To Be An Effective FRIENDRAISER You Need:

1) A Sound Mission & Plan

 Make fundraising AND friendraising a part of your organization's culture from Day One

2) A Strong Positive Identity

- Branding/Positioning
- Build Your Identity Through Public Outreach
- Good Actions = Good Press
- Good Partnerships = Good Word of Mouth = More People Wanting To Partner

3) A Good Team

- Team-playing Leaders who believe in your Mission and are willing to Give and to Ask
- 3 W's
- Ripple Effect



4) To Create a Diversified Fundraising Strategy

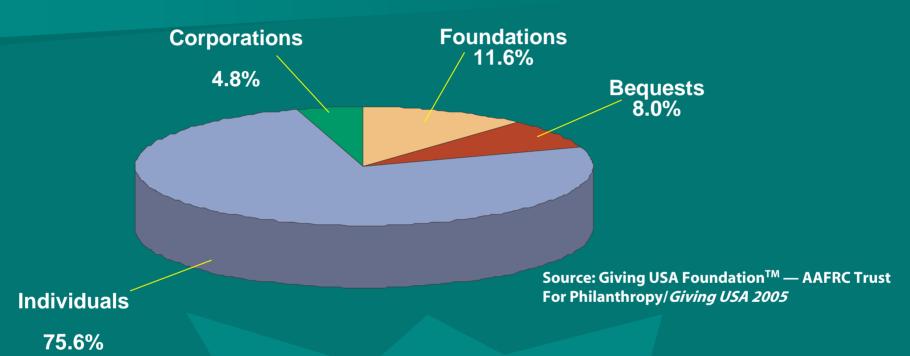
- Take advantage of the experience, education, native ability and imagination of other minds
- What advantages/benefits can you offer
- Meet often & maintain harmony
- Be clear what you are really after
- Be clear about what's been keeping you from getting it
- Create a Plan you will enjoy implementing
- Follow-up to make sure you're following through

Funding Menu:

- The Universe Public/Selected Public
- Earned Income
- Events
- Annual Campaigns
- Support Group Organizations
- Corporations
- Foundations
- Government
- Capital & Special Campaigns
- Planned Giving

Don't depend on only one income stream for more than 25% of your budget.

5) Do Diligent Research



- Spend your time where the money is-Living Individuals.
- Individuals are the Centers of Influence in our Communities & Fundraising efforts.

6) Utilize the Six Degrees of Separation Principle

People Give to People ~ It's All about Relationships!

- People give to make a difference
- People give with their hearts & minds
- People give to experience the joy of giving
- People give because the asker offers an opportunity to meet certain needs
- People give because of the relationship between the donor and the organization

#1 Reason Why People Give: People give because they are ASKED!

7) Train for "The Ask"

Contributions made solely in response to a telephone call are 50% to 75% LESS than the amount given when face-to-face.

- Identity ~ Yours & Your Organization
- Homework/Research
- Peak State
 - Barrier Busting
 - Role Playing
- Rapport
 - Voice/Style ~ tone; tempo; volume; words
 - Physiology ~ state; posture; gestures; facial expressions; breathing; touch; eye contact
- What they really want
- Give them what they really want & get commitment

8) The Ask

- Think positively
- Telephone for an appointment/invitation
- The meeting
 - Introductions ~ Getting to know you
 - The Campaign ~ Great Stories/LISTEN
 - The Ask ~ Be specific
 - The Closing ~ Pledge Card
- Post-visit Follow-up

9) Continue to Engage your Partners & Donors

- Invite them to Orientations, Social Gatherings, Special Events
- Send Press Clippings
- Ask them for advice
- Ask them to volunteer
- Ask them to be on a board or committee
- Invite them to do a lecture; to be on a panel
- Call them regularly to provide updates/success stories

Fundamentals of Development

- People give to People
- Opportunity to make an investment
- A solid Strategic Plan
- Clarity & strength of purpose
- An on-going process
- Good information critical
- Attention to detail
- Strong follow-through
- You can never say "Thank~you" too often

The Secret to Wealth & Happiness

Be a Team Player because people will do more for someone they care about then for themselves.



The Magic Ingredients to Friendraising/Fundraising:

Consistence, Time & Persistence

Nothing in the world can take the place of persistence.

Talent will not; nothing is more common than unsuccessful men with talent.

Geníus will not; unrewarded geníus is almost a proverb.

Education will not; the world is full of educated derelicts.

Persistence and determination alone are omnipotent."

-calvin coolidge

Partnership for the Delaware Estuary Creative Fundraising & Friendraising





<u>Community Involvement Conference</u> <u>Wednesday, June 28, 2006</u> <u>Milwaukee, WI</u>



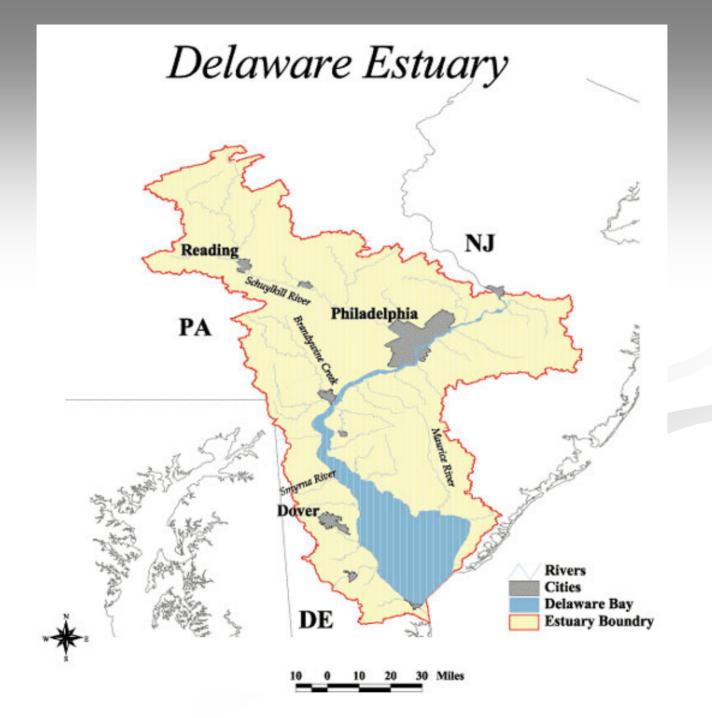
Partnership for the Delaware Estuary Creative Fundraising & Friendraising





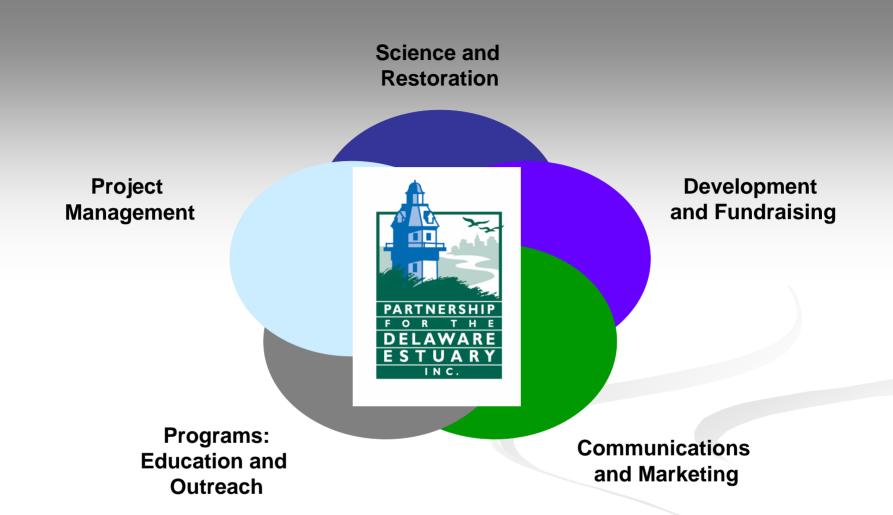
<u>Community Involvement Conference</u> <u>Wednesday, June 28, 2006</u> <u>Milwaukee, WI</u>





Our Mission:

To lead collaborative and creative efforts to protect and enhance the Delaware Estuary and its tributaries for current and future generations.



Our Role: To implement the CCMP by holistically link science, planning, resource management and funding together for the Estuary.

"The Big Picture"

Development and Fundraising

Budget Growth Over Past Six Years

	2001*	2002*	2003*	2004*	2005*	<u> 2006</u>	
Support & Revenue	\$795,513	\$955,975	\$976,739	\$1,086,466	\$1,559,047	\$2,369,172	
Expenses	\$674,349	\$874,138	\$928,036	\$1,009,732	\$1,318,32	\$2,312,292	
Net Assets (Year End)	\$198,003	\$279,840	\$328,543	\$ 405,277	\$ 645,998	3 \$?	



^{*}Audited numbers Budgeted

Partnership's Fundraising/Friendraising Mantra:

BE CREATIVE AND NOT AFRAID TO ASK FOR HELP...

The worst that can happen is that someone says NO!

Two Examples of Fundraising/Friendraising Efforts

- Corporate Environmental Stewardship Program (CESP)
- 2. Experience the Estuary Celebration





CORPORATE ENVIRONMENTAL STEWARDSHIP PROGRAM

CESP is designed to provide corporations across the region with the technical expertise to help them better manage and enhance their land by using native species and restoring natural habitat. The program not only helps to improve the environmental health of the Estuary, but also increases employee morale and reduces property maintenance at the participating sites.

Examples of recent projects:

Mown lawn converted to native meadow

McNeil CSP - PA



30 acres of mown lawn converted to meadow habitat

Ferro - NJ



Native Plants Amtrak - DE



Retention Pond planted with native trees, shrubs and herbaceous plugs.

Doylestown Hospital - PA

Goals of CESP Funding Strategy

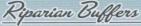
- 1. Develop a mechanism to sustain a program that had previously been totally supported by grant funding.
- 2. Find a way to engage corporate partners on an ongoing basis.
- 3. Create a funding approach that could engage different sized companies not one size fits all.

Meadows vs. Mowing

The True Cost of Green







Bridges Connecting Land and Water



Publicity and Public Outreach Opportunities

Membership Opportunities

Levels of Participation:

GOLDEN EAGLE \$2,500

- 25 Consultation Hours
- Networking Opportunities with Other Members
- Onsite Property Evaluation
- One Article in Estuary News per Year
- Website Link with Logo and Habitat Showcase
- Assistance with Community Outreach
- Employee Workshop
- Technical Assistance with an Annual Earth Day Event
- 4 Invitations to an Annual Ecotourism Excursion

GREAT BLUE HERON \$1,500

- 15 Consultation Hours
- Networking Opportunities with Other Members
- Onsite Property Evaluation
- · One Newsletter listing with Logo per Year
- Website Link with Habitat Showcase
- Assistance with Community Outreach
- Employee Workshop
- 2 Invitations to an Annual Ecotourism Excursion

RED TAIL HAWK \$500

- 5 Consultation Hours
- Networking Opportunities with Other Members
- Onsite Property Evaluation
- One Newsletter Listing per Year
- Website Listing
- Assistance with Community Outreach
- One Invitation to an Annual Ecotourism Excursion

Count us in! As a member of the Delaware Estuary Corporate Environmental Stewardship Program, we look forward to learning more about restoring habitat and improving water quality in the Delaware Estuary.

Company Name:

Contact Name:

Company Address:

Phone:

Fax:

E-mail:

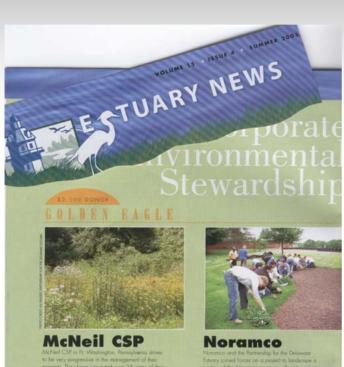
Membership Level:

Partnership for the Delaware Estuary 400 West 9th Street, Suite 100 Wilmington, Delaware 19801

For more information, call the Partnership for the Delaware Estuary at 1-800-445-4935, ext. 17.

This fact sheet was financed by a Growing Greener Grant provided by the Pennsylvania Department of Environmental Protection.

Promote your partners good work...



McNail CSF in Tr. Washington, Prensylvania strives to be very progressive in the management of their property. They have convented over 24 cases of their Bolaces she from move leave to meadow. It is very important to McNail to continue being shawoods of the environment. Each year they plan to expland spoon free inelastic and a so manitar and impose upport their eithort, as well as to manitar and impose upport them eithort, as well as to manitar and impose upport them eithort, as well as to manitar and impose upport their part projects. So for, the company to selected the eithort of th

Narrance and the Pathenhills for the Deleviare Extracy pointed from on a project to bendrage a portion of the Narrance compass with native plants to help control Caractal genesic and reduce incowing on their properly. Nearly there Narrance amployees pathicipated in an ultimison of planting. These large bads were planted with native wideflowers, and gastess, and a fence was suitabled to keep the genesic from entire of all the plants. Once the plants genesic from entire of all the plants. Once the plant are established they will not only provide a boouthail condition to the salt, but more imprortanly, their height will defer the goeses and they will not a fitent for transmission provides and the tree for the consideration. The Delaware Estuary Corporate Environmental Stewardship Program provides corporations within the Delaware Estuary region with the opportunity to take a leadership role in preserving our community's environmental well-being.

Through this program, the Partnership has worked with many corporations over the years. Since becoming a membership program ten corporations have signed on as stewards of the environment. Below is a description of what some of these companies have been able to accomplish as a Corporate Environmental Steward. Some chose to focus on habitat enhancement, and others on educating the public. Either way, the results are impressive and inspirational.



Agilent Technologies

Aginer encourages their employees to porticipate in Earth Day activities each year during the spring. They sponsor several events such as wold/bike to work day and this spring several employees helped track 100 stum diams in the City of Wilmington with "No Dumping" medallions. These specific stom diams are some of the few remaining in the City that do not connect to the sewage treatment system. This year the activities included helping visually impointed childen plant trees at Overbook School for the Bland, and volunteering for the Christina and Branchwise River cleans us.



Wheelabrator Gloucester

Wheelabarars sposses a yearly Symposium for Environment and Education. It is a six-month learning project for seventh and eighth grade students. The goal of the Symposium is to circute environmental and social avvision mess in today's youth and to be on educational, retwarding, and fine experience. Each plant works with their local middle school to develop a project final deals with itsered important environmental issues. The Wheelabarar Giousester plant works closely with students of West Depford Middle School. This year students chose to educate their community about nonpoint source pollution and what the public can do to help, Residents were very impressed with the students work and wrote several letters.

continued

STUARY NEWS + SUMMER 2005



Provide some fun perks...





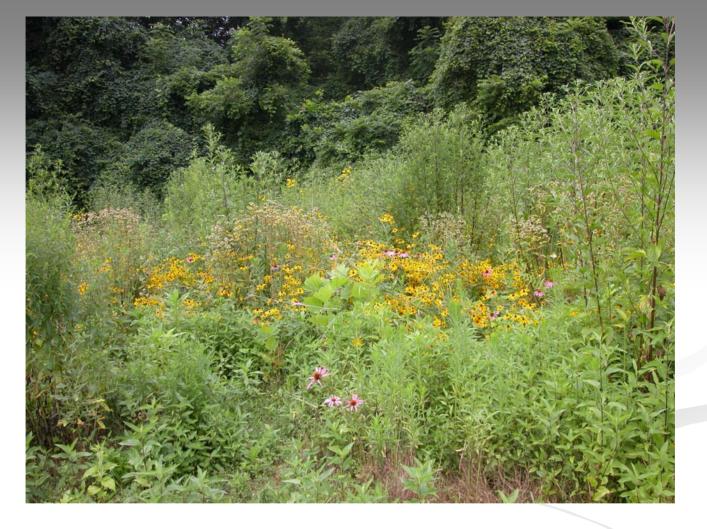




Get some great results...



Employees at Agilent Technologies help mark storm drains in the City of Wilmington. These drains dump directly into a nearby creek. By marking them with "No Dumping" medallions they've helped reduce the amount of pollution that ends up in the water.



McNeil CSP has converted 24 acres of mown lawn on their corporate campus in Ft. Washington, PA. They were so impressed with the project that they decided to educate their local Township about the benefits of reducing mown areas in their parks.

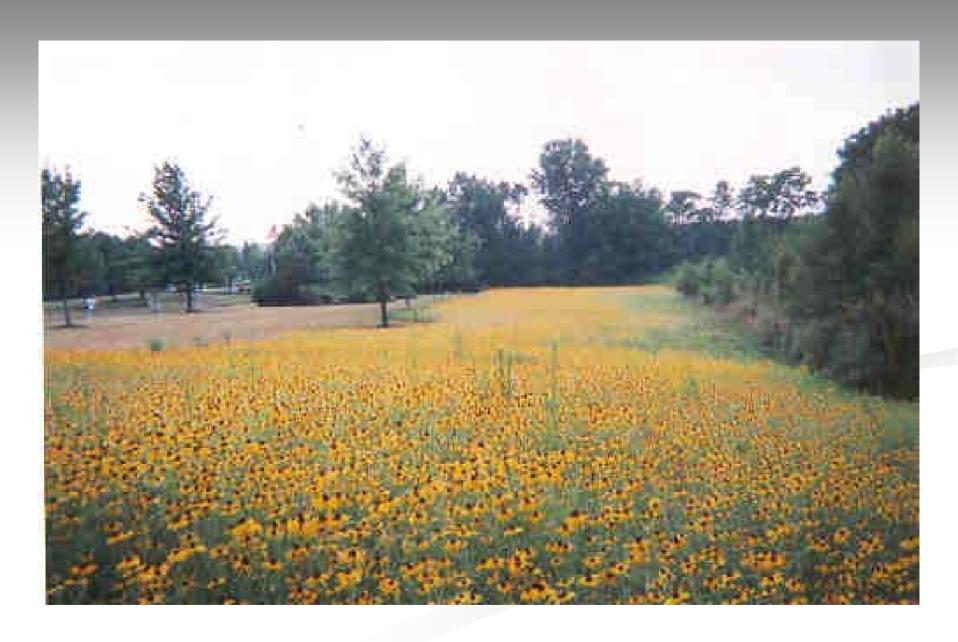


Wheelabrator sponsors a yearly Symposium for Environment and Education. Each plant works with their local Middle School to develop a project that deals with addressing important environmental issues in their area. This year students chose to educate their community about non-point source pollution and what the public can do to help.

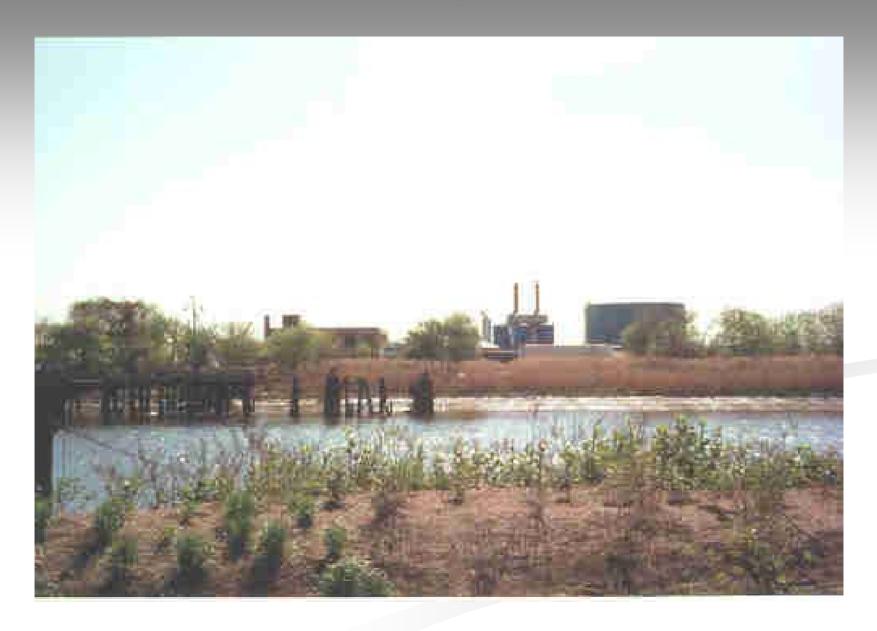
BEFORE



AFTER



BEFORE



AFTER



Participants

Agilent Technologies

DuPont

U S Filter

Mannington Mills

McNeil CSP

Wheelabrator

Uniqema

Cogentrix - Logan Generating Plant

Philadelphia Water Department

Waste Management

New Jersey American Water

Williams Transco Pipeline

Visteon Automotive Systems



Coastal Oil/Sunoco

Valero

Delmarva Power

Ferro

Uniqema

Noramco

Blenheim Bayberry LLC

Berkleigh Country Club

Plymouth Meeting Mall

Tornetta Realty

Amtrak

Experience the Estuary Celebration Annual Fundraiser



Goals of Experience the Estuary Celebration

- 1. Establish an annual event to raise unrestricted funds for the organization.
- 2. Use the event as a way to build our base of support for other funding efforts like the annual appeal.
- 3. Utilize the event as a way to promote the wonders of the Delaware Estuary and to raise general awareness of the resource.

Steps for Success...

- 1. Come up with a theme
- 2. Find a Dinner Chair who is willing to work to sell sponsorships
- 3. Get as much as you can donated or discounted (artwork, printing, giveaways, beer & wine, music, silent auction items, etc.)
- 4. Make the event a party and fun so that guests will come back next year
- 5. Come up with a clever gift for guests to take home as a reminder of the evening
- 6. Capture as much information as you can about your guests when they are at the event

7th Annual Experience the Estuary Celebration - "Bounty of the Bay"

Over **250** guests attended, **150+** donated auction items, and we **raised \$35,220** (net)...





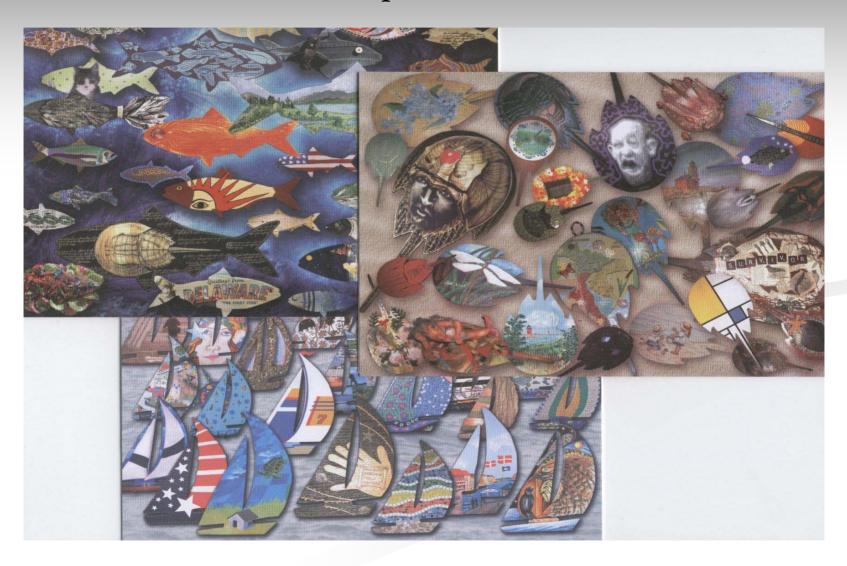




Creative Auction Items

- Lunches, dinners, canoe trips with and donated by VIPS
- Vacation packages
- •Liquor
- Sporting event tickets
- Environmental consulting services
- Canoes and kayaks

Develop creative elements for the event that can have multiple uses...



Feature local delicacies...



Give guests something to take home to remember event...



Take home tips....

When developing any fundraising program, always make sure that:

- •Your target audience will have fun and want to come back for more and to give more in the future;
- ·You ask everyone you know to help and
- •Never take anything or anyone for granted thank everyone who contributes, volunteers, etc.

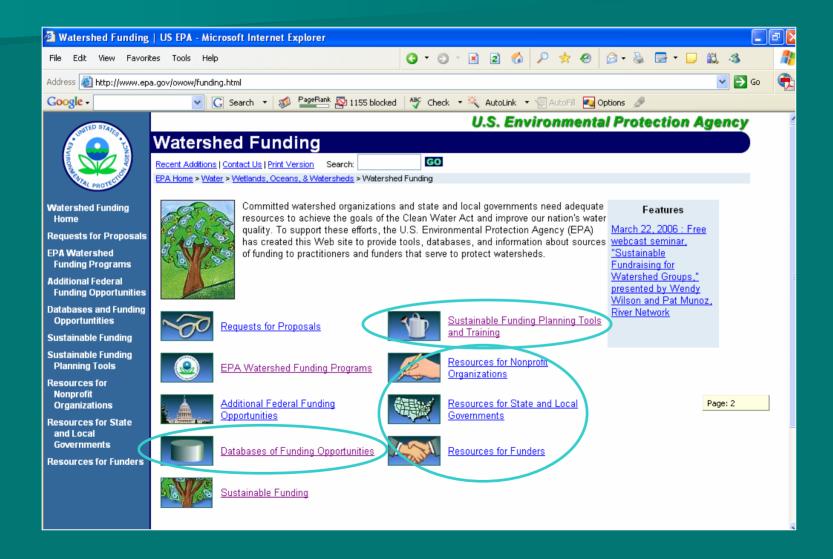
Sustainable Funding Tools

Karen Fligger

Oak Ridge Institute for Science and Education (ORISE)



OWOW Funding Web Page (http://www.epa.gov/owow/funding.html)



Databases of Funding Opportunities

- Grants.gov
- Catalog of Federal Funding for Watershed Protection
 - http://www.epa.gov/watershedfunding
- Directory of Watershed Resources
 - <u>http://efc.boisestate.edu/</u>

Grants.gov



Grantors Applicants EBiz About Us Resources P.L. 106-107 Privacy FAQs Tech Library Site Map



Get Started Find Grant Opportunities

Apply For Grants Customer Support

WHAT'S NEW

GCN Award to Grants.Gov Program Manager

Updated Submit Application Tips

Read the Washington, DC Success Story

Read our Spring 2006 "Succeed" Newsletter.

Check out our Get Started with Grants.gov Webcast!

Find out about the Grants.gov Updates!

Citrix Server Now Available for Non-Windows Users!

Review the latest <u>Stakeholder</u> Meeting Minutes!

Download the Registration Brochure to get started today!

FIND. APPLY. SUCCEED.SM

Grants.gov allows organizations to electronically find and apply for more than \$400 billion in Federal grants. Grants.gov is THE single access point for over 1000 grant programs offered by all Federal grant-making agencies. The US Department of Health and Human Services is proud to be the managing partner for Grants.gov, an initiative that is having an unparalleled impact on the grant community.

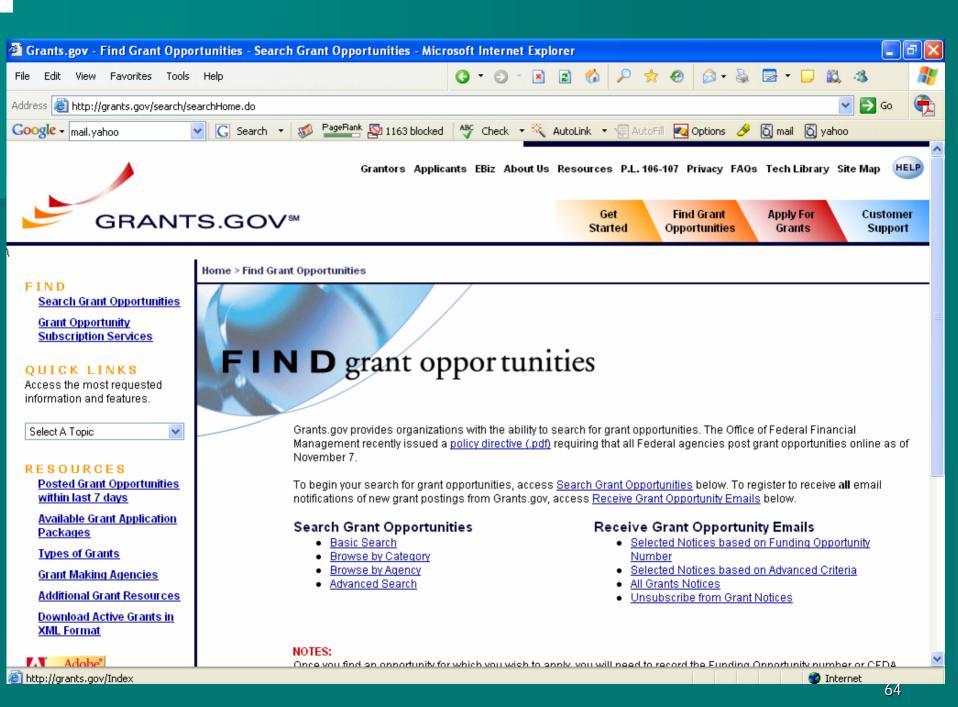
Navigation of Grants.gov is simple. Use the colored tabs and/or links at the top of the screen to access primary sections of the site or the links to the left and below to access information on specific topics.

Find Grant Opportunities

- Search for Grant Opportunities
- Register for Email Notification of Grant Opportunities
- Resources for Grants
- Find Information on Government Benefits for Individuals

Apply For Grants

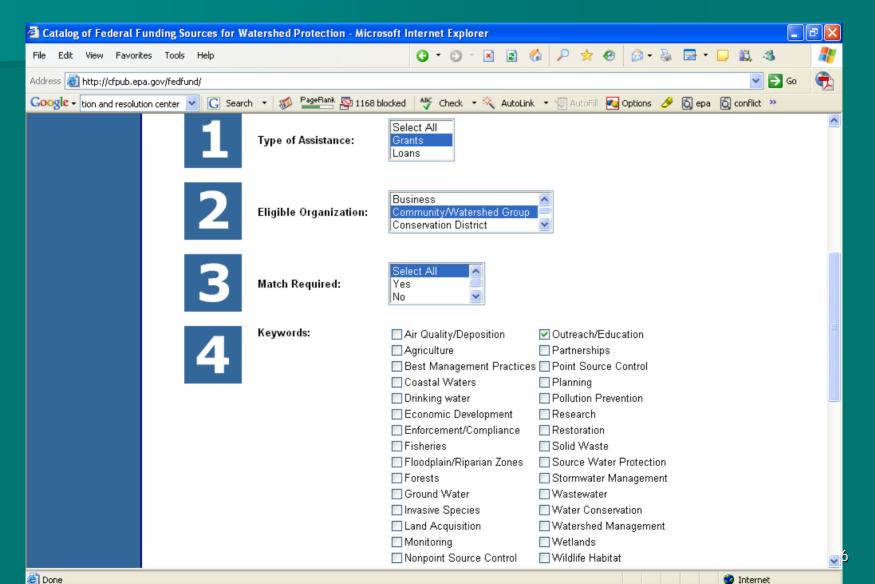
- Prepare to Apply for Grants Through Grants.gov
- Download grant application packages
- Complete a Grant Application Package
- Submit a Completed Grant Application Package
- Check the Status of an Application Submitted via Grants.gov



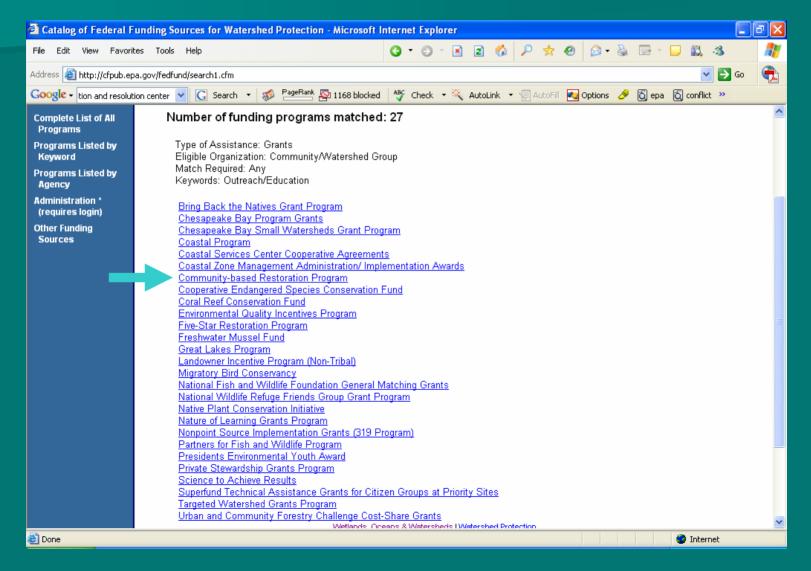
Search Grants.gov

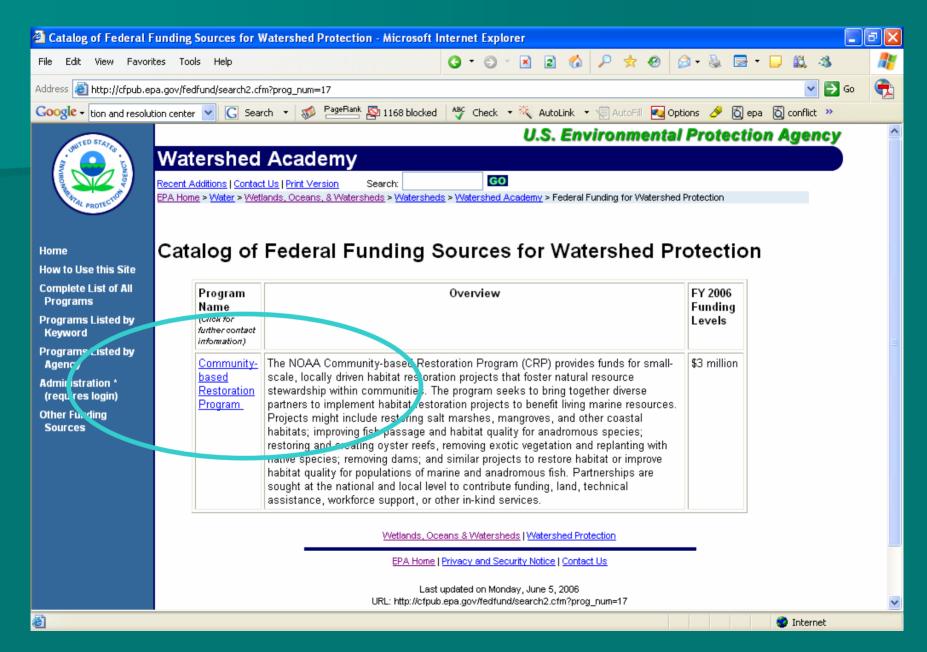
- Basic Search
 - Keyword, Funding Opportunity Number, CFDA Number
- Browse by Category
 - E.g. Environment, Natural Resources, Community Development, Education, Disaster Prevention & Relief
- Browse by Agency
 - States of Texas & Minnesota, City of Orlando, District of Columbia, Appalachian Regional Council
- Advanced Search
 - Dates
 - Category
 - Instrument
 - Eligibility
 - Agency

Search the Catalog of Federal Funding for Watershed Protection



Results from the Catalog of Federal Funding for Watershed Protection



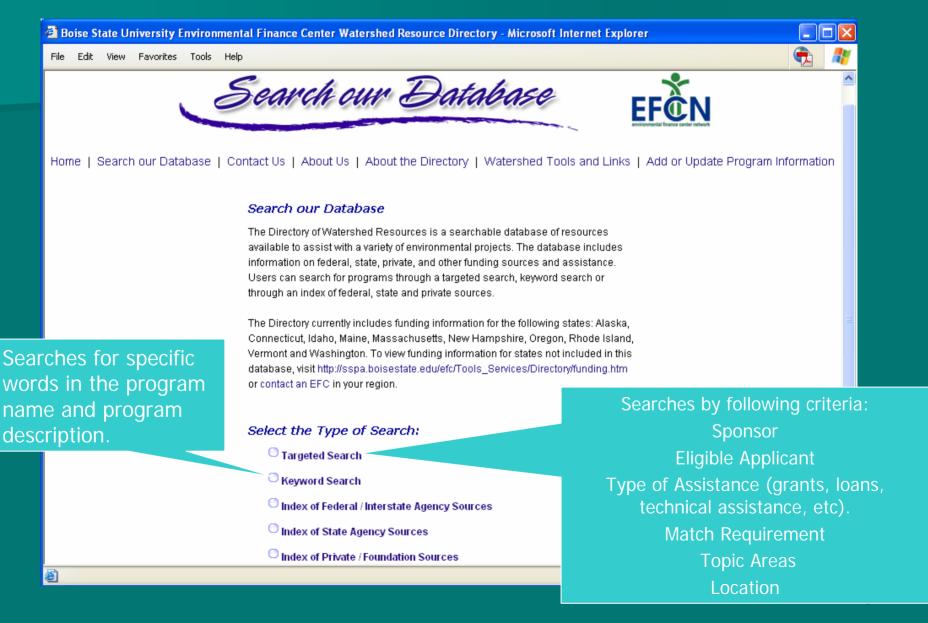


Additional Information for Each Program

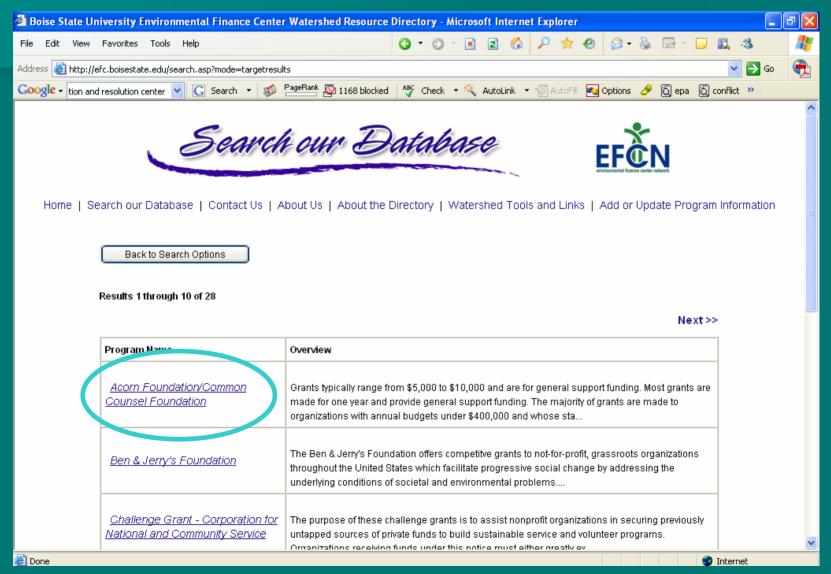
- Funding Program Name: Community-based Restoration Program
- Application Deadline
- When Funds are Available
- Average annual number of applicants
- Typical percentage of applicants funded
- Is a matched amount required?
- Match Amount
- Funding Level (FY 200, FY 2005, FY 2006)
- Typical lowest amount awarded

- Typical highest amount awarded
- Typical median amount awarded
- Other details on funding
- Primary Contact Information (Address, Telephone, Email, Internet)
- Secondary Contact Information (Address, Telephone, Email, Internet)
- Legislative Authority
- Associated Keywords
- Eligible Organizations
- Eligibility Constraints

Directory of Watershed Resources



Results for Targeted Search: Non-profit, Environmental Advocacy, and Nationwide



Information for Each Program

- Program Name
- Program Information
 - Sponsor(s) (fed, state, etc.):
 - Program Description / Purpose:
 - Program Requirements / Restrictions:
 - Program Active:
 - Program Website:
 - Other Information:
- Eligibility Information
 - Eligible Applicant(s):
 - Eligible State(s):
 - Geographic Scope:
 - Other Eligibility Requirements:

- Award Information
 - Assistance Type:
 - Award Amount:
- Application Information
 - Application Deadline:
 - Application Review Time Length:
 - Application Available Online?
 - Application Website:
 - Selection Priorities / Criteria:
- Contact Information
- Example of Funded Projects
- Topic Areas

Sustainable Funding Planning Tools and Training

- Webcasts
 - http://clu-in.org/
 - Plan2Fund: A Tool to Organize Your
 Watershed Funding
 - Sustainable Financing for Watershed Groups

Resources

- For nonprofit organizations, state and local governments, and funders
 - Examples:
 - Environmental Finance Center (EFC) Network
 - EPA's Grants Desk Top Resource
 - The Foundation Center (FC)
 - U.S. State and Local Gateway
 - Environmental Grantmakers Association



Questions?

- Tim Jones (EPA)
 - 202-566-1245 or <u>iones.tim@epa.gov</u>
- Gayle Marriner-Smith (Peconic Estuary Program)
 - 631-765-1766 or gm-s@ecovision.com
- Kathy Klein (Partnership for the Delaware Estuary)
 - 302-655-4990 or kklein@delawareestuary.org
- Karen Fligger (ORISE)
 - 202-566-1284 or <u>fligger.karen@epa.gov</u>